



2018 Year in Review

SOFTWARE AND SERVICES THAT FOCUS YOUR ORGANIZATION ON WHAT MATTERS

So much progress!

Strategic Planning

We were thrilled to add new clients representing all sectors. The Stratex Strategic planning software work for organizations of all types providing support for best practice strategic planning, innovation and continuous improvement efforts.

This year clients reported exciting outcomes:

- Dramatic improvement in stakeholder relationships
- The ability to manage 100% growth in the organization through management of resources as a key component of their strategic planning process
- Increased employee satisfaction through engagement in the strategic planning process
- For the first time employees were able to understand how their work organization's vision and mission
- An important organizational core value was added to demonstrate the importance of relationships in the delivery of the organizational mission.

Baldrige Award Applicant and Examiner systems:

In 2017 we launched the nation's first online Baldrige award application in partnership with the Florida Sterling Award. In 2018 we built on the success of the application software and added a system to manage the evaluation of the application by the examiner teams. The system provided a seamless transition from the organization's completion of their assessment responses to the development of their award application to the development of feedback by the examiner teams.

"We were thrilled with the software. It was so easy to use. It worked exactly as we expected" Dan Tischier, Director, Acute Care Communications, ProMedica



Coming in 2019!!!

by Sneak Preview

Think Strategy in a Box meets TurboTax for Strategic Planning - a product that will transform your organizations approach to strategic planning by guiding you through every step of the process. Imagine a tool that facilitates the development and execution of your plan, providing embedding explanations and examples. Every employee will know what the plan is, what's expected of them, and how you will win!

FOR MORE INFORMATION

www.Stratex.solutions



STRATEX SOLUTIONS

SOFTWARE AND SERVICES THAT FOCUS YOUR ORGANIZATION ON WHAT MATTERS

Speaking and Exhibiting - All Year Long!



THE PROMISE OF STRATEGIC PLANNING AND THE REALITY OF RESULTS | A CASE STUDY OF TWO ORGANIZATIONS

DR. RAJNA KNOX, CEO STRATEX SOLUTIONS



MIDWEST TRANSPLANT NETWORK

CULTURAL TRANSFORMATION, ORGANIZATIONAL LEARNING AND KNOWLEDGE MANAGEMENT: EMBARKING ON THE DEVELOPMENT OF A ROBUST STRATEGIC PLANNING PROCESS IS CHALLENGING. THE INITIAL PROCESS TOOK ABOUT NINE MONTHS AND THOSE WHO WOULD SAY THAT THE CHALLENGES WERE BEYOND WHAT THEY EXPECTED. MANY ORGANIZATIONS LACK KNOWLEDGE OR HAVE BEST PRACTICE STRATEGIC PLANNING APPROACHES. THESE SKILLS DO NOT NEED TO BE CORE COMPETENCIES, SO PROFESSIONAL SERVICES PROVIDED IMPORTANT SUPPORT TO SHORTEN THE LEARNING TIME AND REDUCE THE RISK OF MISSTEPS. LEADERSHIP AND TEAMS WERE DEEPLY ENGAGED IN THE HARD WORK OF CHANGING KEY ORGANIZATIONAL PRACTICES.

THE ORGANIZATION IS NOW IN YEAR SIX OF THE PROCESS. DURING THE FIRST YEAR, PROFESSIONAL SERVICES WERE PROVIDED TO ESTABLISH THE PROCESS AND TO LEAD THE ORGANIZATION THROUGH EACH OF THE CRITICAL STEPS. IT WAS FRUSTRATING AND TIME CONSUMING. THERE WERE TIMES WHEN THEIR EMPLOYEES QUESTIONED THE INTENSITY OF THE WORK AND SOME OF THE GUIDANCE PROVIDED, BUT THEY PERSISTED. THE SECOND YEAR WAS A BIT LESS FRUSTRATING. THEY KNEW WHAT TO EXPECT AND THEY STAYED TRUE TO THE PROCESS. THE PLANNING PROCESS WAS SMOOTHER AND TOOK LESS TIME. PROFESSIONAL SERVICES WERE IN PLACE, BUT AT A REDUCED LEVEL FROM THE FIRST YEAR. YEAR THREE THE ORGANIZATION TOOK THE PROCESS ON THEIR OWN. PROFESSIONAL SERVICES FACILITATED THE INTERNAL AND EXTERNAL ANALYSIS, BUT THE ORGANIZATION WAS ABLE TO DO THE MAJORITY OF THE STRATEGY DEVELOPMENT ON THEIR OWN THAT YEAR. THEY ARE CURRENTLY IN YEAR SIX AND ARE PROJECTING THE YEAR OF THEIR SECOND FULL YEAR OF PROFESSIONAL SERVICES ASSISTED WITH STAKEHOLDER FEEDBACK AND FACILITATION OF THE INTERNAL AND EXTERNAL ANALYSIS, BUT ORGANIZATIONAL LEADERSHIPS TAKE CONTROL OF THE PROCESS. THEY ADJUSTED THE PROCESS TO BEST FIT THEIR ORGANIZATION. THEY REFERENCED THE LESSONS LEARNED ALONG THE WAY AND CHANGED APPROACHES ACCORDINGLY AND THE ORGANIZATION LEARNED.

- THE STRATEGIC PLANNING PROCESS BUYS ORGANIZATIONAL LEARNING AND THE CAPACITY TO CONDUCT BEST PRACTICE STRATEGIC PLANNING ON THEIR OWN. CULTURAL TRANSFORMATION SUPPORTED THE INTEGRATION OF THE PLANNING PROCESS AND SUPPORTED THE MANAGEMENT OF THE SIGNIFICANT GROWTH IN EMPLOYEES AND ORGANIZATION OUTCOMES. BELOW ARE SOME OF THE UNINTENDED OUTCOMES DERIVED:
 - KNOWLEDGE MANAGEMENT WAS BUILT THROUGH CAPACITY BUILDING AND THROUGH THE PROCESS FOR EMPLOYEES' STRATEGIC PLANNING OUTCOMES AND A HIGH LEVEL OF INCLUSION OF EMPLOYEES AT ALL LEVELS.
 - RESOURCE MANAGEMENT APPROACHES EARLY IN THE PROCESS RESULTED IN SIGNIFICANT OVER ALLOCATION OF KEY PERSONNEL. FIVE YEARS LATER THEY USE A RESOURCE ALLOCATION PROCESS BASED ON REALISTIC ALLOCATION OF ORGANIZATIONAL AND EMPLOYEE CAPACITY.
 - LEADERSHIP GOVERNANCE PROCESSES EMBRACED THE TASK OF MANAGING THE PLAN IN ADDITION TO TYPICAL TOPICS LIKE FINANCIAL REVIEW AND KEY PRIORITIES.
 - EMPLOYMENT WAS ACHIEVED THROUGH HOLISTIC TO THE PROCESS YEAR OVER YEAR AND COMMUNICATION ABOUT THE PLAN AND OUTCOMES.

BOTH ORGANIZATIONS ARE EXPERIENCING IMPROVED OUTCOMES AS A RESULT OF EMBARKING ON THE DEVELOPMENT AND DEPLOYMENT OF BEST PRACTICE STRATEGIC PLANNING APPROACHES. IN ADDITION, BOTH ORGANIZATIONS HAVE EXPERIENCED POSITIVE OUTCOMES THAT MAY NOT HAVE BEEN ANTICIPATED WHEN BEGINNING THE PROCESS.

LIFE ALLIANCE ORGAN RECOVERY AGENCY

STAKEHOLDER ENGAGEMENT: LAORA IS IN THE LATE STAGE OF EXECUTION AND GOVERNANCE PHASE, WILL STILL LATELY IN THE STRATEGIC PLANNING DEPLOYMENT PROCESS, THEY HAVE ALREADY EXPERIENCED IMPROVED OUTCOMES AND A STAKEHOLDER ENGAGEMENT LEVEL FAR ABOVE WHAT WAS DISPLAYED PRIOR TO EMBARKING ON THE STRATEGIC PLANNING JOURNEY.

SOME UNEXPECTED THINGS HAPPENED WITH THEIR STAKEHOLDERS STARTING WITH THE INITIAL ANNOUNCEMENTS OF THE INVITATION TO GATHERING SESSIONS. EACH OF THE ITEMS WOULD BE CONSIDERED POSITIVE, ALL TOGETHER THEY PROVIDE A VIEW OF A HIGHLY ENGAGED SET OF STAKEHOLDERS, WHICH IS AN UNUSUAL POSITION TO BE IN. IT IS SIMPLY NOT TYPICAL TO HAVE STAKEHOLDERS RAPIDLY ENGAGED FROM THE BEGINNING. LAORA IS NOW IN THE SECOND YEAR OF THEIR PLANNING EFFORTS. THE STAKEHOLDERS ARE AN INTEGRAL PART OF THE PROBLEM SOLVING PROCESS TO FACILITATE RIGHT ALIGNMENT BETWEEN THE OPPORTUNITIES FOR IMPROVEMENT AND THE SOLUTIONS IMPLEMENTED.

THE COURSE OF EVENTS: THE ORGANIZATION ANNOUNCED THEIR INTENT TO COMPLETE A ROBUST STRATEGIC PLANNING PROCESS THAT INCLUDING OPPORTUNITIES FOR STAKEHOLDERS TO PROVIDE INPUT. WITHIN A WEEK, THERE WAS A WAITING LIST FOR SEVERAL OF THE GROUPS. SOME OF THE STAKEHOLDER GROUPS ARE TYPICALLY HARD TO GET TIME WITH. IN ADDITION TO PARTICIPATING IN THE SESSIONS, THEY CAME WITH FEEDBACK THEY SPECIFICALLY WANTED TO PROVIDE. THEY WERE PRESENTED AND THEY WERE PASSIONATE. THEY WANTED TO BE PART OF THE DEVELOPMENT OF THE FUTURE FOR THE ORGANIZATION. A FULL DAY SESSION WAS SCHEDULED FOR THEM TO BE ABLE TO HELP PRIORITIZE THE FUTURE STRATEGIES (AT THEIR REQUEST), AND THEY PARTICIPATED ENTHUSIASTICALLY. THESE INCREDIBLY BUSY PEOPLE TOOK A DAY OUT OF THEIR SCHEDULE TO BE ENGAGED. THE ORGANIZATION SHARED THE REPORT DEVELOPED AS AN OUTCOME OF THE STAKEHOLDER SESSIONS WITH ALL WHO ATTENDED AND WITH KEY STAKEHOLDERS, PROVIDING A LEVEL OF TRANSPARENCY UNPRECEDENTED BY THOSE ATTENDING THE SESSIONS. ALMOST IMMEDIATELY THE ORGANIZATION STARTED GETTING REFERRAL STAKEHOLDERS THAT HAD BEEN INACTIVE. THE INCLUSION OF ORGANIZATIONS WHO HAD BEEN UNENGAGED IN THE STAKEHOLDER SESSIONS HAD AN IMMEDIATE IMPACT ON DAILY WORK.



METHODOLOGY
STRATEGIC PLANNING IS CONSIDERED TO BE A KEY REQUIREMENT FOR A WELL-RUN ORGANIZATION AND LEADERS ARE TAUGHT IN HIGHER EDUCATION AND THROUGH PROFESSIONAL DEVELOPMENT ACTIVITIES THAT A PLANNING PROCESS ADDRESSING SHORT AND LONG TERM GOALS AND OBJECTIVES IS THE KEY TO BOTTOM LINE RESULTS. WHAT IS FREQUENTLY NOT TAUGHT IS HOW TO IMPLEMENT AND MANAGE THE PROCESS.

EXECUTION OF A STRATEGIC PLAN, THE MOST COMMON CAUSES OF FAILURE INCLUDE LACK OF A PLAN FOR EXECUTION, INCONSISTENT ALIGNMENT BETWEEN THE STRATEGIC PLAN AND THE WORK PERFORMED DAILY, INSUFFICIENT RESOURCE PLANNING, AND THE EVER-PRESENT CHALLENGE OF EFFECTIVE COMMUNICATION.

